

Passenger traffic strengthens over summer despite geopolitical and economic headwinds

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Passenger traffic grew +3.9% in July and +3.1% in August, accelerating from +1.3% in Q2 – but stark differences persist across national markets.

Brussels, 30 September 2026: European airport trade body ACI EUROPE today released its air traffic report for August 2026, together with an analysis of traffic performance across the two busiest months of the summer season.

Passenger traffic across the European airport network increased by **+3.9%** and **+3.1%** respectively in **July** and **August**, versus the same months last year.

This marked a clear acceleration from the second quarter of 2026 (+1.3%), when the impact of the war in the Middle East constrained growth.

Non-EU+ airports¹ recorded particularly strong growth in both July (+6.6%) and August (+6%), while growth in the EU+ market² was more moderate (July: +3.4%; August: +2.5%).

Olivier Jankovec, Director General of ACI EUROPE said: *"The rebound in passenger traffic over the peak Summer months shows that air travel demand remains resilient despite continued geopolitical tensions, deteriorating macroeconomic conditions, supply constraints and higher airfares. For Europeans, going on holidays and visiting friends and relatives remains a priority, while our continent remains a magnet for travelers from around the World."*

"But these headline growth figures mask stark divergences across national markets. Geopolitics are increasingly shaping performance, with passenger traffic stalling – or even declining – in several markets that would normally enjoy strong summer demand."

"Looking ahead, the geopolitical energy shock is likely to put further pressure on both supply and demand. Airlines are already tightening capacity and increasing air fares to mitigate their rising jet fuel costs. At the same time, the cost-of-living crisis re-emerging across Europe will test the resilience of demand. For airports, this means a more uncertain outlook with renewed traffic risks and intensifying competitive pressures into the winter season."

STARK DIVERGENCES ACROSS NATIONAL MARKETS

In **August 2026**, the strongest passenger traffic performances in **the EU+ market** came from airports in Slovakia (+61%), Slovenia (+19.3%), Estonia (+16.4%), Hungary (+13%) and Malta (+12.3%).

At the other end of the spectrum, airports in Iceland (-9.3%), Austria (-6%), France (-1.7%), Cyprus (-1.5%), Norway (-0.3%) and Germany (-0.2%) posted the weakest results.

Amongst the largest EU+ markets, airports in leisure-driven Italy (+5.2%) and Spain (+4.7%) were the most dynamic. The UK (+0.9%), alongside France and Germany, underperformed the European average.

Airports in **the non-EU+ market** also recorded wide variations in passenger traffic performance, reflecting differing exposure to geopolitical developments as well as stronger underlying demand growth in less mature aviation markets.

Airports in North Macedonia (+34.8%), Montenegro (+28.6%), Albania (+20.7%), Israel (+19.5%), Armenia (+14.2%), Moldova (+12.6%) and Uzbekistan (+10.5%) recorded double-digit growth. Türkiye, the largest market in the group, maintained a positive momentum at +4.4%.

AIRPORT MARKET SEGMENTS

Major airports (over 40 million passengers) grew by **+1.3%** in August:

- Istanbul Airport became the busiest European airport over the Summer, welcoming 8.6 million passengers in August (+3%). London Heathrow (7.9 million | -2.1%) ranked second, followed by Paris-Charles de Gaulle (6.9 million | -1.1%).
- Istanbul Sabiha Gökçen (+9.5%) and the Spanish hubs of Madrid (+4.9%) and Barcelona (+4.5%) stood out for their dynamic increases.
- London-Gatwick (-3.4%) underperformed, while Amsterdam-Schiphol (+0.1%), Frankfurt (-0.3%) and Munich (-0.5%) remained broadly flat.

Mega airports (25-40 million passengers) also underperformed and saw passenger volumes increase by **+0.8%**. The best performances in that category came from Malaga (+6.5%), London Stansted (+6.5%), Athens (+3.7%) and Copenhagen (+3.6%).

Large airports (10-25 million passengers) and **Medium airports (1-10 million passengers)** posted the best performance and grew at **+4.8%** and **+5.2%** respectively – largely driven by selective Low Cost Carrier expansion and to a lesser extent new transatlantic connectivity:

- The five fastest growing Large airports all achieved double-digit growth: Tirana (+20.7%), Tel Aviv (+19.5%), Tashkent (+16.6%), Ankara (+13.3%) and Venice (+12.7%).
- Bratislava (+75.9%), Trapani (+52.3%), Podgorica (+47.6%), Skopje (+34.8%) and Palermo (+32.3%) were amongst the fastest growing Medium airports.

Small airports (less than 1 million passengers) saw their passenger traffic increase by **+4.2%**. However, this category remains the only one not having recovered its pre-pandemic (August 2019) passenger levels (-25.5%) – reflecting their exposure to supply pressures and airlines favouring larger and more profitable markets.

FREIGHT AND AIRCRAFT MOVEMENTS

Freight traffic across the European airport network remained essentially flat in July (+0.3%) before increasing by +3% in August.

Amongst Europe's top 10 airports for freight traffic, Istanbul Airport recorded the strongest growth in August (+18.1%) and topped the ranking in absolute terms. Brussels (+8.6%) and Amsterdam (+7.6%) also posted dynamic increases.

Aircraft movements increased by +2.7% in July and +2.2% in August.

DATA BY AIRPORT GROUP

The airports that reported the most dynamic growth in passenger traffic in August 2026 vs August 2025 are as follows:

- **Majors:** Istanbul SAW (+9.5%), Madrid MAD (+4.9%), Barcelona BCN (+4.5%), Istanbul IST (+3%), Rome FCO (+1.4%).
- **Mega airports:** Malaga AGP (+6.5%), London STN (+6.5%), Athens ATH (+3.7%), Copenhagen CPH (+3.6%), Manchester MAN (+2.7%).
- **Large airports:** Tirana TIA (+20.7%), Tel Aviv TLV (+19.5%), Tashkent TAS (+16.6%), Ankara ESB (+13.3%), Venice VCE (+12.7%).
- **Medium airports:** Bratislava BTS (+75.9%), Trapani TPS (+52.3%), Podgorica (+47.6%), Skopje SKP (+34.8%), Palermo PMO (+32.3%).
- **Small airports:** Logroño–Agoncillo RJL (+598.3%), Stockholm BMA (+502.9%), St. Gallen–Altenrhein ACH (+116.4%), Bucharest Băneasa BBU (+83.6%), Debrecen DEB (+59.2%).

¹ Albania, Armenia, Azerbaijan, Belarus, Bosnia & Herzegovina, Georgia, Israel, Kazakhstan, Kosovo, Moldova, Montenegro, North Macedonia, Russia, Serbia, Türkiye, Ukraine, and Uzbekistan.

² EU, EEA, Switzerland and the UK.

ENDS

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For your password to access these sections, please contact us by e-mail at: corise.nel@aci-europe.org. Your request will be validated, and the password will be e-mailed to your work address.

The report presents data for ACI EUROPE Members and might not be representative of the total European airport traffic.

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